

**2002 Winter Olympic Games – Impacts, Images and Legacies**  
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**ABSTRACT**

*Research has played a key role in the state of Utah's planning efforts and preparation for the 2002 Winter Olympic Games in Salt Lake City, Utah. Specifically, through multi-agency collaboration and public/private cooperation, the state has developed an Olympic research program that: 1) Guides public investment and resource allocation through an in-depth forecast analysis of the economic, demographic and fiscal impacts of the 2002 Winter Olympic Games; 2) Identifies the effect of the Olympics on the awareness and image of Utah in key international markets; 3) Influences marketing programs in key industry segments before, during and after the Games; and 4) Establishes a framework from which to evaluate the Games' lasting legacies.*

**ECONOMIC IMPACT ESTIMATES**

Beginning in 1998, the Utah Governor's Office of Planning and Budget authored a study to provide the Governor, state legislature, state agencies, local government, the organizing committee and the public with credible estimates of the economic, demographic and fiscal impacts of the 2002 Olympic Winter Games. This analysis is critical to state government for planning, budgeting and policy development. Individuals outside of state government will also find it useful because of the far-reaching impacts of such a mega-event.

Specifically, this study analyzes the additional output, income, employment, population and government revenue and expenditure that is generated because of the injection of new money into the Utah economy. Input and scrutiny was requested and received from the Governor's Council of Economic Advisors, composed of a group of business analysts and economists from various state agencies, local universities and private sector businesses.

The most recent edition of the analysis was published in November of 2000 and updated the original work completed in 1998 with improved estimates, better data and updated models. The state will continue to monitor the economic, demographic and fiscal impacts and update and expand this work as necessary prior to and after the Games.

The 2002 Winter Olympic Games will generate a significant amount of employment, earnings and output in the Utah economy before, during and even after the Games. Analysts have focused primarily on the effect of new out-of-state money that enters the Utah economy as a result of the Games.

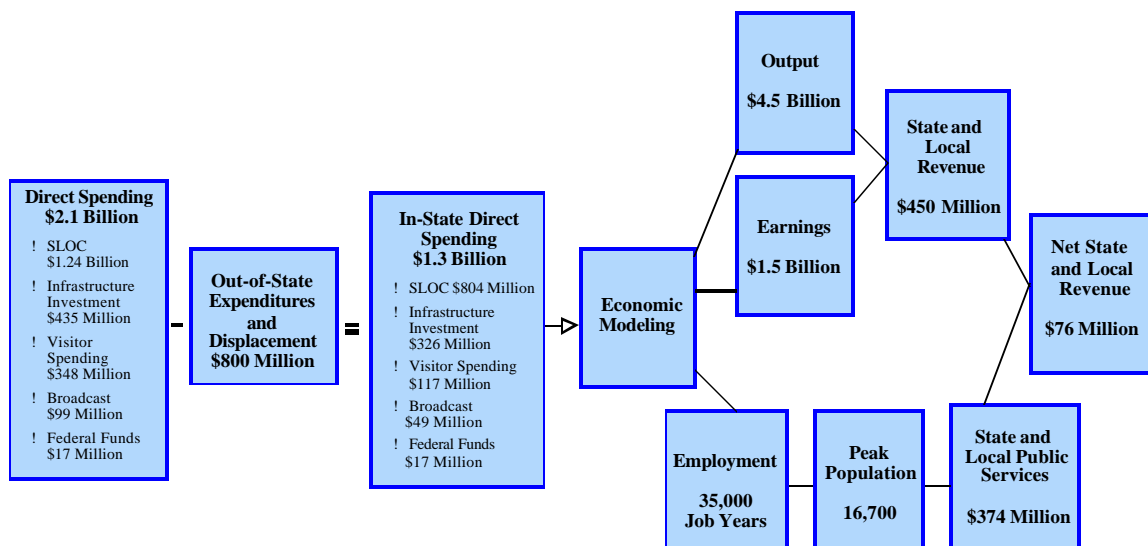
**Direct Spending: Between 1996 and 2003, it is estimated that total direct spending related to the Olympics will be \$2.1 billion.** The new money injected into the Utah economy is derived from a number of sources, including the Salt Lake Organizing Committee, infrastructure investment, visitor spending, broadcast spending, and federal funds. **However, because of leakages outside the state, only \$1.3 billion actually impacts the Utah economy.** The term leakage describes the fact that although a good or service may be purchased in the state, some of the value is produced out-of-state. In addition, money that originates from in-state sources represents a redistribution of existing economic activity and thus is not counted as new

spending. Finally, it is assumed that a significant amount of visitor spending displacement will occur as a result of a decrease in out-of-state skier visits during the 2001-02 season.

<b>SOURCES OF NEW OLYMPIC MONEY 1996-2003</b> (millions of \$2000)			
<b>Source</b>	<b>Direct Spending</b>	<b>Out-of-State Expenditures &amp; Displacement</b>	<b>In-State Direct Spending</b>
SLOC	\$1,240	\$436	\$804
Infrastructure Investment	\$435	\$109	\$326
Visitor Spending	\$348	\$231	\$117
Broadcast	\$99	\$50	\$49
Federal Funds	\$17	--	\$17
<b>TOTAL</b>	<b>\$2,100</b>	<b>\$800</b>	<b>\$1,300</b>

To estimate the impacts resulting from the In-State Direct Spending related to the Olympics, the Utah State and Local Government Fiscal Impact Model (FIM) was used to capture the interaction between the economy, the population and government revenue and expenditure. The results of the economic modeling are summarized below.

### Economic, Demographic, and Fiscal Impacts in Utah 2002 Olympic Winter Games 1996 through 2003



**Total Economic Output: \$4.5 billion.** This is the broadest measure of economic activity that includes all sales (both final and intermediate) estimated to occur because of the Games.

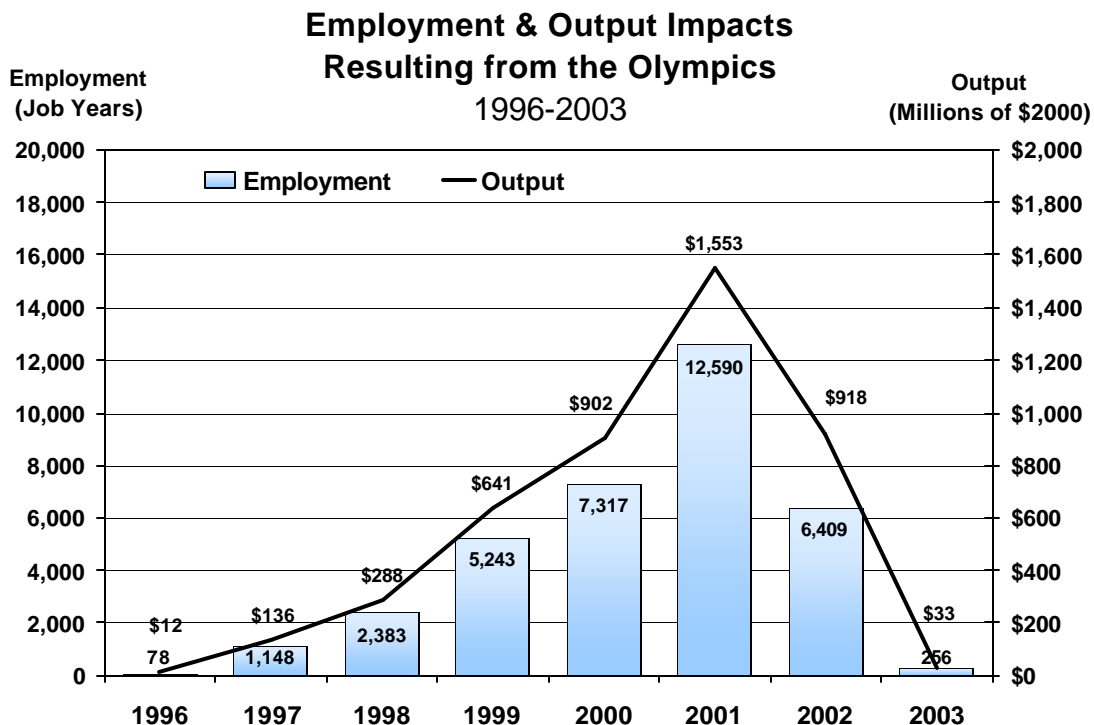
**Employment: 35,000 job years.** Olympic employment includes those with decade-long jobs as well as those employed for only a few months. The sum of employment for Olympic related or induced jobs is equivalent to 35,000 jobs lasting one year. Olympic related employment is relatively small compared to the size of the total economy, representing just 0.2% of total jobs in the state in 1997 and peaking at 0.5% of total jobs in 2001. However, Olympic related jobs are

an important source of new job growth. Olympic related jobs represent 5.1% of projected employment growth in 1998 and 33.4% of projected employment growth in 2001. Given recent unemployment figures and the continued economic deceleration, Olympic related jobs may represent an even higher percentage of new job growth than previous models indicated.

**Earnings: \$1.5 billion.** Earnings include salaries, wages, benefits and proprietor's income.

**Net Revenue to State and Local Government: \$76 million.** Net revenues to government are the result of Olympic related tax revenues of \$450 million minus Olympic related public service expenditures totaling \$374 million. Significantly, it is anticipated that the Olympics will generate a surplus to state and local government and will not increase the tax burden on Utah residents.

**Population: 17,000 peak population increase in 2001.** Olympic population changes are the result of in-migration of many temporary Olympic related residents including broadcasters, construction workers, athletes, service providers, vendors, etc. relocating to the state prior to the Olympics and then leaving following the Olympics. As with employment, the impact on the total population is small (0.1% of the population in 1997 and 1.4% during the Games) but significant in terms of new population growth. Olympic related population growth accounts for an estimated 45% of the new population growth in 2001 and then decreases to a net out-migration by 2003.



Source: Governor's Office of Planning and Budget

## UTAH AWARENESS & IMAGE

The International Utah Awareness and Image Survey is a multi-phase survey designed to provide generalized results relating to international awareness of Utah and subsequent images commonly associated with the state. Further, the survey tests the awareness of the 2002 Winter Olympic Games in relation to the host city and state (Salt Lake City, Utah).

The International Utah Awareness and Image Survey serves as a benchmark measure (time<sub>0</sub>) of Utah's awareness and images among consumers in several key international markets prior to the 2002 Winter Olympic Games to be hosted in Salt Lake City, Utah. A similar study one and/or two years following the Games will allow a measure of the impact of the Games on Utah's awareness and images among international consumers (time<sub>1</sub>).

Beginning in 1999, the Utah Division of Travel Development identified the markets to be surveyed, including five European markets (France, Germany, Italy, the Netherlands and the United Kingdom), one Asian market (Japan) and one Latin American market (Argentina).

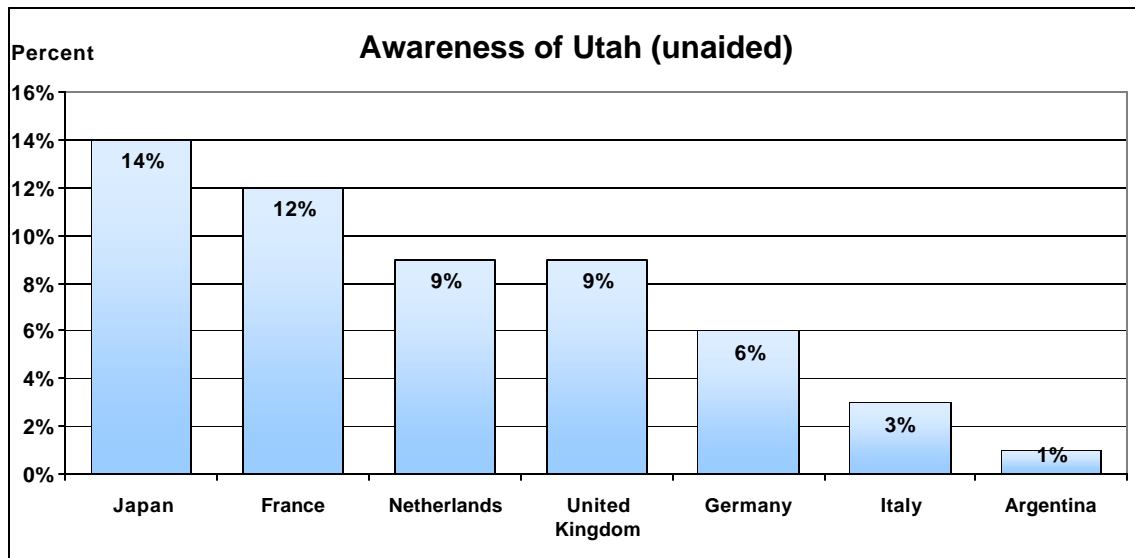
A network of professionals, including academicians and private research institutions were contracted by the State to conduct the survey. In each market, a qualified research manager was identified who had previous survey experience in that market and was familiar with any unique conditions or circumstances. The survey instrument was standard for each market, with minor variations to accommodate local characteristics and facilitate question comprehension. The questionnaires were translated and administered by native speakers in the country of the survey. The research managers supervised completion of the fieldwork and provided expertise in analyzing the results. In each country, a minimum of 500 telephone surveys was completed from a random sample of listed telephone numbers. Quasi-stratified quota sampling was used based on household location, age and gender.

Sample Descriptive Characteristics			
Country	Sample Size	Dates of Survey	Gender
Germany	537	March – June 1999	40% male 60% female
France	498	March – June 1999	46% male 54% female
United Kingdom	501	March – June 1999	45% male 55% female
Italy	527	March – June 1999	48% male 52% female
Netherlands	500	March – June 1999	51% male 49%female
Argentina	500	July – August 2000	48% male 52% female
Japan	542	June – August 2000	46% male 54% female

## International Awareness of Utah

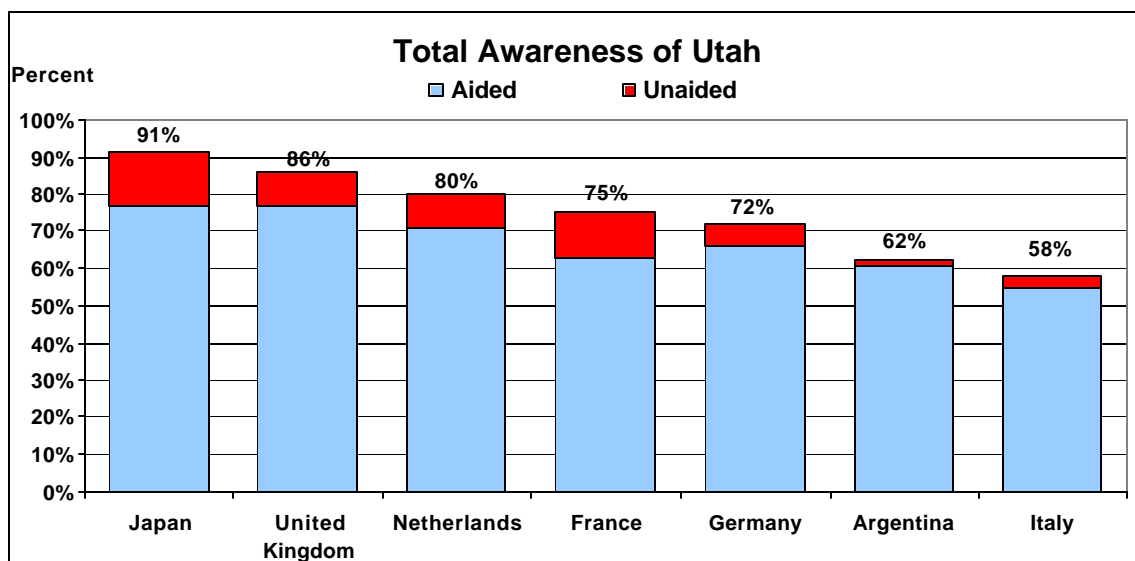
### ***“What states come to mind when you think about the American West? (unaided)”***

As expected, unaided awareness (top-of-mind recall) of Utah in selected international markets was low, averaging roughly 8%. However, there was considerable variance by country, ranging from a high of 14% in Japan to a low of just over 1% in Argentina.



### ***“Have you heard of the following other states? (aided)”***

Respondents indicated a much higher awareness of Utah on the aided portion of the survey, ranging from 77% in the United Kingdom and Japan to 55% in Italy. Average total awareness (aided plus unaided) across all markets was 75% although there was considerable variation by country.



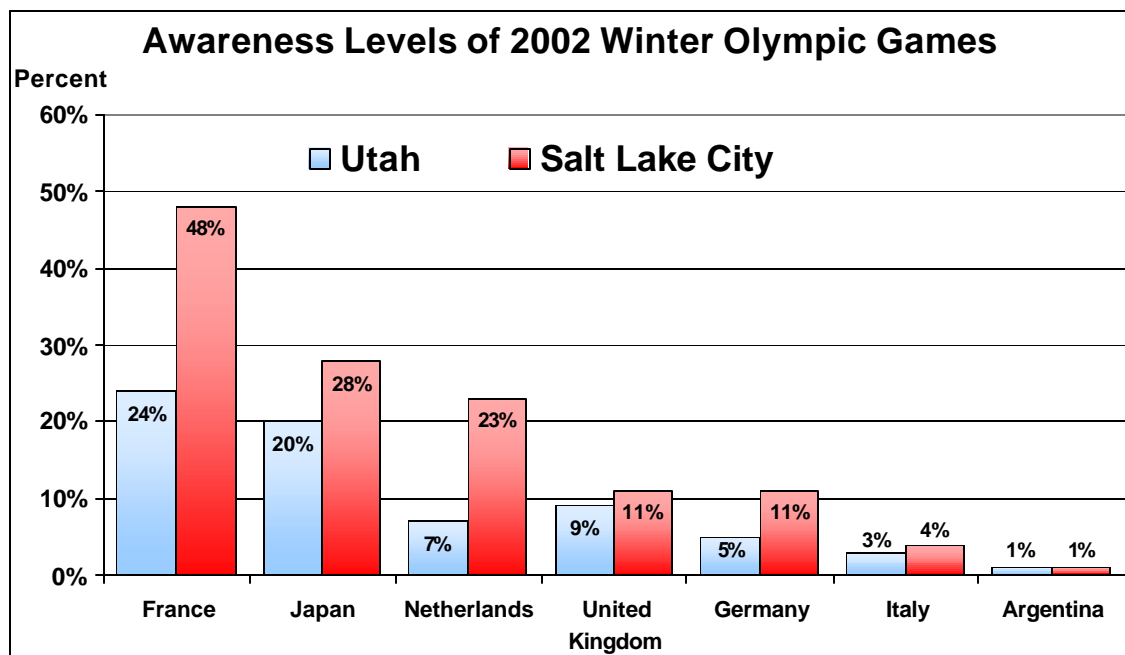
In order to determine what effect, if any, the Olympics may have on Utah's level of awareness in international markets, awareness was also tested for several surrounding states. In general, it was found that Utah is relatively competitive with most surrounding states in terms of top-of-mind recall. However, Utah lags considerably behind other states in total awareness. By repeating these surveys following the Olympics, it will be possible to determine whether the attention and publicity focused on Utah during the Games will have translated into additional top-of-mind recall and/or more general awareness about the state.

Awareness Levels of Western States																		
	Arizona			California			Colorado			Nevada			New Mexico			Utah		
Country	Unaided	Aided	Total	Unaided	Aided	Total	Unaided	Aided	Total	Unaided	Aided	Total	Unaided	Aided	Total	Unaided	Aided	Total
France	12%	75%	87%	60%	33%	93%	13%	77%	90%	4%	73%	77%	3%	63%	66%	12%	63%	75%
Germany	7%	85%	92%	29%	67%	96%	5%	87%	92%	6%	83%	89%	6%	83%	89%	6%	66%	72%
Italy	5%	75%	80%	32%	58%	90%	4%	81%	85%	6%	79%	85%	7%	73%	80%	3%	55%	58%
Netherlands	9%	81%	90%	45%	47%	92%	4%	88%	92%	8%	71%	79%	4%	84%	88%	9%	71%	80%
United Kingdom	23%	58%	81%	43%	50%	93%	17%	66%	83%	12%	73%	85%	14%	70%	84%	9%	77%	86%
Japan	9%	84%	93%	37%	60%	97%	10%	81%	91%	7%	76%	83%	7%	70%	77%	14%	77%	91%
Argentina	2%	91%	93%	24%	75%	99%	2%	86%	88%	1%	89%	90%	1%	88%	89%	1%	60%	61%
Averages	10%	78%	88%	39%	56%	94%	8%	81%	89%	6%	78%	84%	6%	76%	82%	8%	67%	75%

## International Awareness of the 2002 Winter Olympic Games

***“Do you know which state (city) in the American West is hosting the 2002 Olympic Winter Games?”***

On average, less than 10% of international respondents knew that Utah was host of the 2002 Winter Olympic Games. However, awareness of Salt Lake City as the host of the Olympics was much higher, averaging 18%. Olympic awareness was highest among respondents in France and Japan and lowest in Italy and Argentina. To better understand the dynamics of these results, it is important to consider the circumstances in each market (France – Jean-Claude Killy; Netherlands – S.A.R. Le Prince Orange; Japan – 1998 Winter Olympic Games in Nagano; Argentina – low interest in winter sports).



## Utah's Image in International Markets

***“What images come to your mind when you think about the state of Utah?”***

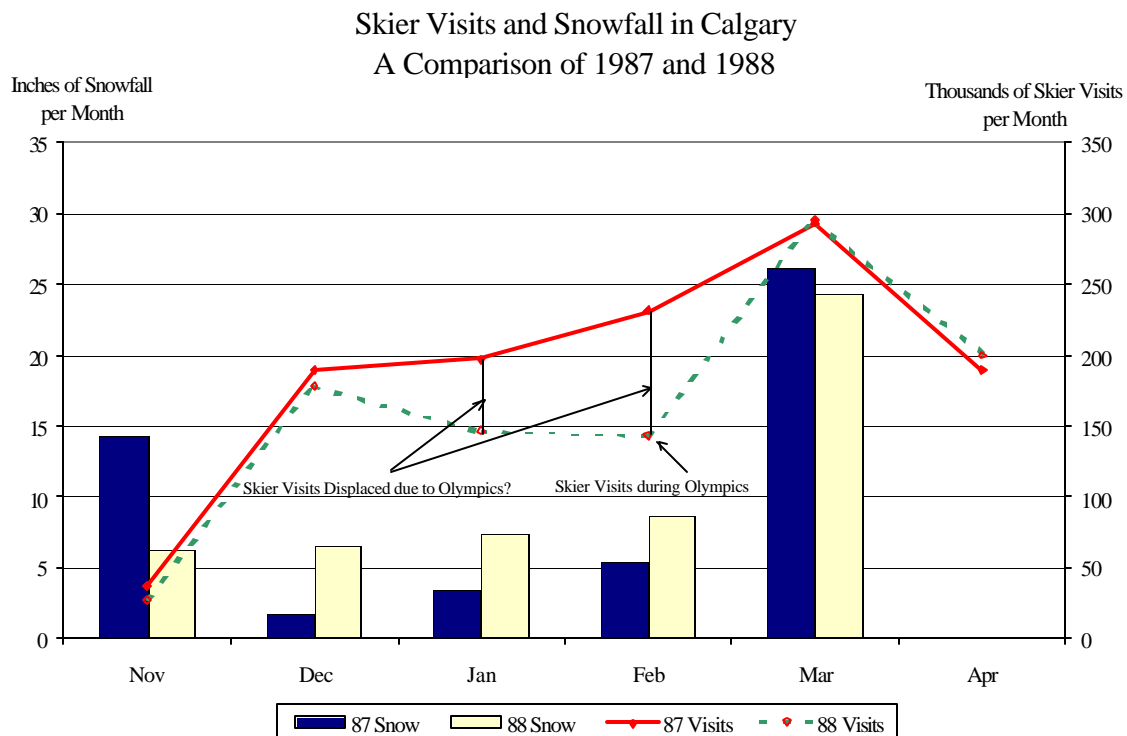
Although nearly 80% of respondents indicated that they had heard of Utah, much fewer could identify any specific images associated with the state. The top image associated with the state was the Church of Jesus Christ of Latter-Day Saints (Mormons), named as one of the top three images in every market. A few other images were also frequently named in each market, including rural/open spaces, mountains and desert/hot. While some of the images named were specific to Utah, many were stereotypical of the American West (including the Rocky Mountains and the Southwest) and could be used interchangeably with many surrounding states. Among the Utah specific identifiers, the most common images were the LDS Church, the Olympics and the Great Salt Lake.

Top Utah Images			
Country	1 <sup>st</sup> Mentioned	2 <sup>nd</sup> Mentioned	3 <sup>rd</sup> Mentioned
Germany	LDS/Mormon	Western	Olympics
France	LDS/Mormon	Olympics	Rural/Open Spaces
United Kingdom	LDS/Mormon	Desert/Hot	Rural/Open Spaces
Netherlands	Desert/Hot	Mountains	LDS/Mormon
Italy	Mountains	Desert/Hot	LDS/Mormon
Japan	Kent Derricott	Rural/Open Spaces	LDS/Mormon
Argentina	Mountains	Utah Jazz	LDS/Mormon



## INDUSTRY SPECIFIC RESEARCH

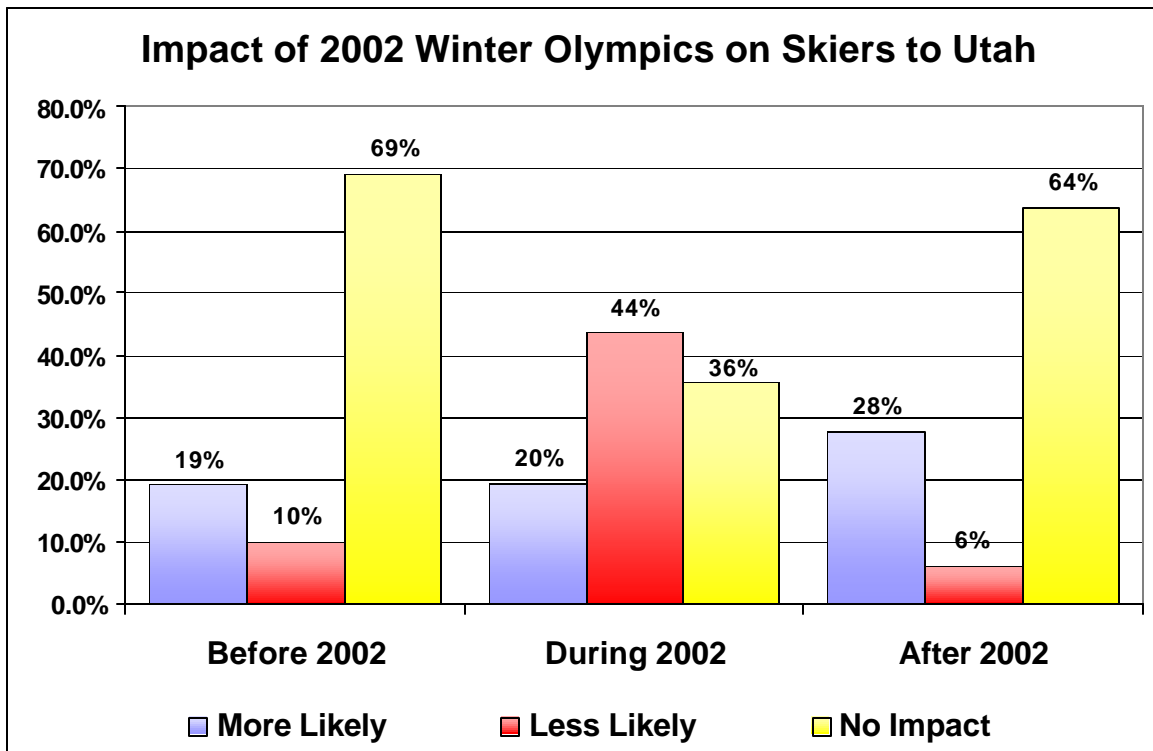
Beginning with the 1996-1997 Utah Skier Survey and continuing with the 1999-2000 Utah Skier Survey, the Utah Division of Travel Development along with other major partners in county government and private industry identified the need to better understand the impact the Olympics would have on the ski industry in Utah. While no one doubted that the long-term benefits of hosting the 2002 Winter Olympic Games would be significant for Utah's ski industry, many were concerned about a drop off of skier visits during the Olympic year. Citing conditions that occurred in Calgary during the 1988 Olympic Winter Games, the Utah ski industry raised concerns of whether Utah could expect a similar displacement of skier activity for its resorts during 2002. In addition, since only 2% of the skiable terrain will be used for Olympic events, many resort owners feared the economic benefits during the Olympics would accrue unequally, with the venue locations receiving the bulk of the attention while the other resorts remained under utilized. To test the hypothesis, questions were added to the triennial Utah Skier Survey to gauge the effect of the Olympics on skier attitudes and preferences regarding skiing in Utah.



Results from the first survey conducted during the 1996-97 ski season indicated that the Olympics would provide a positive stimulus for returning to ski in Utah both before and after 2002. Over 30% indicated they were more likely to ski in Utah before 2002 as a result of Utah hosting the 2002 Games and nearly 36% indicated they would return following the Games. The large majority of those remaining indicated that the Olympics would have no effect on their ski vacations either before or after the Games. However, nearly 50% of non-resident skiers indicated that they would not consider skiing in Utah during 2002. The results from the skier survey seemed to confirm the Calgary experience of a pronounced skier displacement effect during the Olympic year.



During the next skier survey, the same question was asked in regards to the effect of the Olympics on whether to ski in Utah before, during and after the Olympic year. In addition, a few new questions were added to the survey to determine the reasons for an adverse impact during the Olympic year. Similar to the 1996-97 results, the 1999-2000 survey confirmed a skier displacement effect. Interestingly, the 1999-2000 survey recorded a higher level of ambivalence regarding the effects of the Olympics on ski decisions and a lower stimulus on return visits because of the Olympics. When probed as to the reason for not skiing in Utah during 2002, respondents indicated crowds (76%) and higher prices (20%) were the primary deterrents to Utah skiing.



The implications of this survey were significant for the Utah economy. With an estimated contribution of nearly a billion dollars in direct and in-direct spending, the ski industry represents an important engine of economic activity for the state. Despite the positive impacts that the ski industry will likely enjoy following the Olympics, resort owners, tourism professionals and even the state legislature recognized the importance of leveraging marketing programs with Olympic-related attention and publicity to ensure a strong winter season during 2002.

# OLYMPIC LEGACIES

In the tradition of past Olympic Games, there is always an enduring legacy that remains once the crowds have gone and the fanfare has subsided. Through multiple projects coordinated through government agencies at the state, county and municipal levels as well as with private business and industry associations, a framework for evaluating the legacy of the 2002 Winter Olympic Games has been identified. The framework involves examining issues in five major categories:

- Cost – Benefit Analysis to State and Local Government
- Infrastructure and Facilities
- Awareness and Image
- Visitation
- Civic Pride and Community Spirit

**Cost – Benefit Analysis to State and Local Government.** Throughout the planning stages and in preparation for hosting the Games, estimates have been made regarding the economic, demographic and fiscal impacts of hosting the Olympics. While these estimates are useful for planning purposes, it is also important that a final accounting be made that measures the accuracy of the estimates and provides credible data regarding the true costs as well as the true benefits of hosting the Games. A similar fiscal impact model will likely be used in the final measurement as was used for the planning forecasts. In addition, policy makers at every level of government will be concerned about any remaining tax liability the Games may require, including liabilities for operation and maintenance of facilities once the Games conclude. Many of these issues have been rigorously researched throughout the planning phases and contingency plans have been established, including considerable financial contributions from the Salt Lake Organizing Committee to finance operations and maintenance of many facilities during the transition phase from Olympic venue to community facility. Current estimates indicate that the Organizing Committee has obtained 96% of its \$1.3 billion budget with several months remaining. In addition, SLOC will be able to fulfill its more than \$200 million Olympic legacy contributions, including sales tax repayments, endowments and facilities construction debts. However, it is important to monitor the reality of the transition for several years following the Games to determine the true costs and benefits associated with this event.

**Infrastructure and Facilities.** In addition to the new investment considered essential to hosting the 2002 Olympic Winters Games, a considerable amount of investment that would normally occur after the Games will be accelerated to maximize the opportunities the Games provide. The experience of influential visitors during the Games combined with the impression of the millions of people watching on television around the world and the likelihood of increased visitation following the Games all encourage immediate investment. Thus, the Olympics will affect a variety of infrastructure investments, including public facilities, such as highways and transit systems, and private facilities, such as lodging properties and ski resorts. Some projects such as venues and access roads are built specifically for the Olympics. In other cases, only the timing of the infrastructure investment is impacted. The end result is more economic activity from 1996 to 2002 than would otherwise occur.

Public & Private Investment Beneficial to the 2002 Olympic Winter Games (millions of dollars)						
Project Type	Total Cost	Federal Participation	SLOC Participation	Other Participation	Externally Financed Spending due to Olympics	Non-SLOC Externally Financed Spending due to the Olympics
Venues	\$321.9	--	\$151.5	\$170.4	\$151.5	--
Housing	\$143.8	\$14.7	\$32.1	\$97.0	\$46.8	\$14.7
Transportation	\$2,253.3	\$891.9	--	\$1,361.4	\$163.2	\$163.2
Hotels	\$297.0	--	--	\$297.0	--	--
Resorts	\$756.8	--	\$57.8	\$699.0	\$300.0	\$242.2
Miscellaneous	\$256.7	\$18.7	\$6.0	\$232.0	\$19.2	\$13.2
<b>TOTAL</b>	<b>\$4,029.5</b>	<b>\$925.3</b>	<b>\$247.4</b>	<b>\$2,856.8</b>	<b>\$680.7</b>	<b>\$433.3</b>

### Sample of Olympic Legacy Facilities



**Soldier Hollow.** Soldier Hollow will be among the busiest of venue sites during the 2002 Games, hosting 19 events. Following the Games, Soldier Hollow may become one of the feature attractions of Wasatch Mountain State Park, already one of the state's most visited destinations with over 900,000 visitors annually. Soldier Hollow's redesigned course features 28 kilometers of cross-country trails built with numerous environmental safeguards. A new access road and improvements to the water delivery and irrigation system improve visitor management capabilities and permit more sustainable tourism growth.



**Utah Olympic Park.** The Utah Olympic Park is a 386-acre complex that houses a regulation bobsleigh and luge track and five regulation ski jumps. It is one of only three bobsleigh runs in North America and one of only two ski jump facilities in the U.S. Following the Games, it is anticipated the Park will become a popular tourist stop and one of the premier training and competition facilities in North America.



**Olympic Village.** The University of Utah will be the home of the Olympic Village during the Games. The Olympic Village consists of approximately 20 modern, low-rise apartment and suite-style units built for student housing at the University. When completed, there will be a planned capacity of 3,500. Following the Games, the units will greatly enhance student housing at the University.



**Rice-Eccles Stadium.** Rice-Eccles Stadium at the University of Utah will be the location for the opening and closing ceremonies. The stadium replaces the old facility, which was the oldest and smallest in the Western Athletic Conference. The new facility accommodates 46,500 spectators with state-of-the-art facilities, lighting, irrigation and drainage.



**Utah Olympic Oval.** The ice sheet designed to host the speed skating events should prove to be the fastest in the world due to the building's design and Utah's unique combination of altitude and dry air. The facility is one of only six enclosed ovals in the world and houses a 400-meter enclosed oval with two full-sized hockey sheets, a weight training room, a sports medicine room, 15 locker rooms, a pro shop, concessions and a skate rental area.

### **Sample of Other Olympic Legacies**

- Completion of Light Rail Lines for mass transit throughout the Salt Lake Valley
- Reconstruction of interchanges at I-80 Silver Creek and Kimball Junction
- Trappers Loop Road providing improved access to Snowbasin Resort
- Expansion of the size and quality of the local lodging market
- Expansion of the size and quality of local ski resorts

**Awareness and Image.** Past Olympic host cities (notably Calgary) have documented the rise in awareness levels afforded their respective destinations following the Olympics. Similarly, the image of the destination is often modified to reflect the "personality" of the Games, as influenced by the type of media coverage the host city receives. The Utah Division of Travel Development has completed the first phase of an international awareness and image study that will gauge the effect of the Olympics on international awareness and image of Utah in key markets. The results of the first phase provided a benchmark level of awareness as well as common images associated with the state. The second phase of the survey will provide a longitudinal perspective on awareness and image, in specific relation to the stimulus provided by the 2002 Winter Olympic Games. Other qualitative research conducted in domestic markets will provide insight into the influence of the Games on Utah's image within key domestic markets.

**Visitation.** As part of the on-going efforts to monitor the status and performance of the tourism industry in Utah, many visitation indicators are recorded on a regular basis and will continue to be monitored before, during and after the Games. These indicators provide insight into the level of activity within the industry as well as the dynamics of visitation patterns. For example, possible visitation indicators that may be influenced by the Olympics include airport passenger counts, skier visits, convention activity, specific visitor counts at area attractions, lodging, restaurant and car rental tax revenues, sales tax revenues in tourism sensitive industries, and occupancy rates. Analysis of these indicators combined with an understanding of the macroeconomic environment and historic growth rates should provide a reasonable foundation from which to extrapolate the effects of the Olympics on visitation patterns to Salt Lake City as well as to Utah.

**Civic Pride and Community Spirit.** One of the most difficult Olympic legacies to define or quantify is the intangible benefit of increased civic pride and community spirit that the Games may inspire. Possible measurements of this legacy might include resident involvement in the Olympics, including ticket sales, event attendance, volunteerism, festival attendance or hospitality levels. Local involvement in Olympic-related community programs such as torch relay celebrations, youth education efforts and health and sport initiatives will provide insight into the community spirit associated with the Games. After the Games, the sentiment of residents towards the Olympic experience will largely affect local involvement in continued tourism development. A positive experience may stimulate widespread support for increased tourism development while a negative sentiment might create a backlash against future tourism growth.

## CONCLUSION

In describing the post-Olympic condition of Calgary, researcher J.R. Brent Ritchie observed, "Each Olympic Games, while drawing on the legacy of its forerunners, reflects a unique set of circumstances. The characteristics of the host region and its people, the prevailing international situation, and the evolving nature of the event itself all combine to produce a set of impacts which can be anticipated but which are difficult to predict accurately." Utah's own experience would seem to corroborate Mr. Ritchie's observation. Indeed, each Olympic Games presents its own set of challenges and opportunities, unique to the timing, leadership, political, social and economic environment to which it is subjected. On-going research efforts continue to help Olympic organizers, civic leaders and business owners plan for the successful presentation of the Olympic Games and an enduring legacy following the event. Further research efforts will help document the impacts, images and legacies of the Olympic Games on Salt Lake City and on the state of Utah.

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